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Slovakia

Fresh Deciduous Fruit

Annual

2004

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Report Highlights:

This year's apple crop is expected to be the same as last year at around 60,685 MT due to favorable spring weather that was hindered by increased incidences of insect pests and fungal diseases. Less intensive orchards will continue to be abandoned, whereas the acreage of intensive orchards will increase slightly. Slovakia is net importer of fresh and processed fruit. No major changes are expected in trade. Total domestic consumption will remain fairly stable.

Includes PSD Changes: Yes
Includes Trade Matrix: No
Annual Report
Vienna [AU1]
[LO]

Fruit Production

In 2003, total Slovak fruit production amounted to 88,935 MT. This represented an increase of 8,551 MT, or 10.6 percent compared to the previous year. A little over 68 percent (60,685 MT) of total Slovak fruit production comes from apples. In 2003, apple production rose by 9,513 MT (or 15.7 percent) in comparison to 2002. After apples, plum production is the second largest fruit production followed by pears, and peaches. During the last three years production of apples, pears, peaches and apricots was growing steadily, whereas plums production declined. In 1998 to 2000, apple production was at the highest level. (Please see: Figure 2 and Figure 1).

The number of fruit trees increased in 2003 by 1,830,100 (+12 percent) and the total number of trees reached 17,074,552.

The acreage of intensive fruit orchards in 2003 amounted to 6,672 hectares that corresponds to 62 hectares (-0.1 percent) less than the previous year. In 2003, total yields harvested from intensive orchards amounted to 41,131 MT, which is 46.2% (in 2002: 39.9 percent) of the total production.

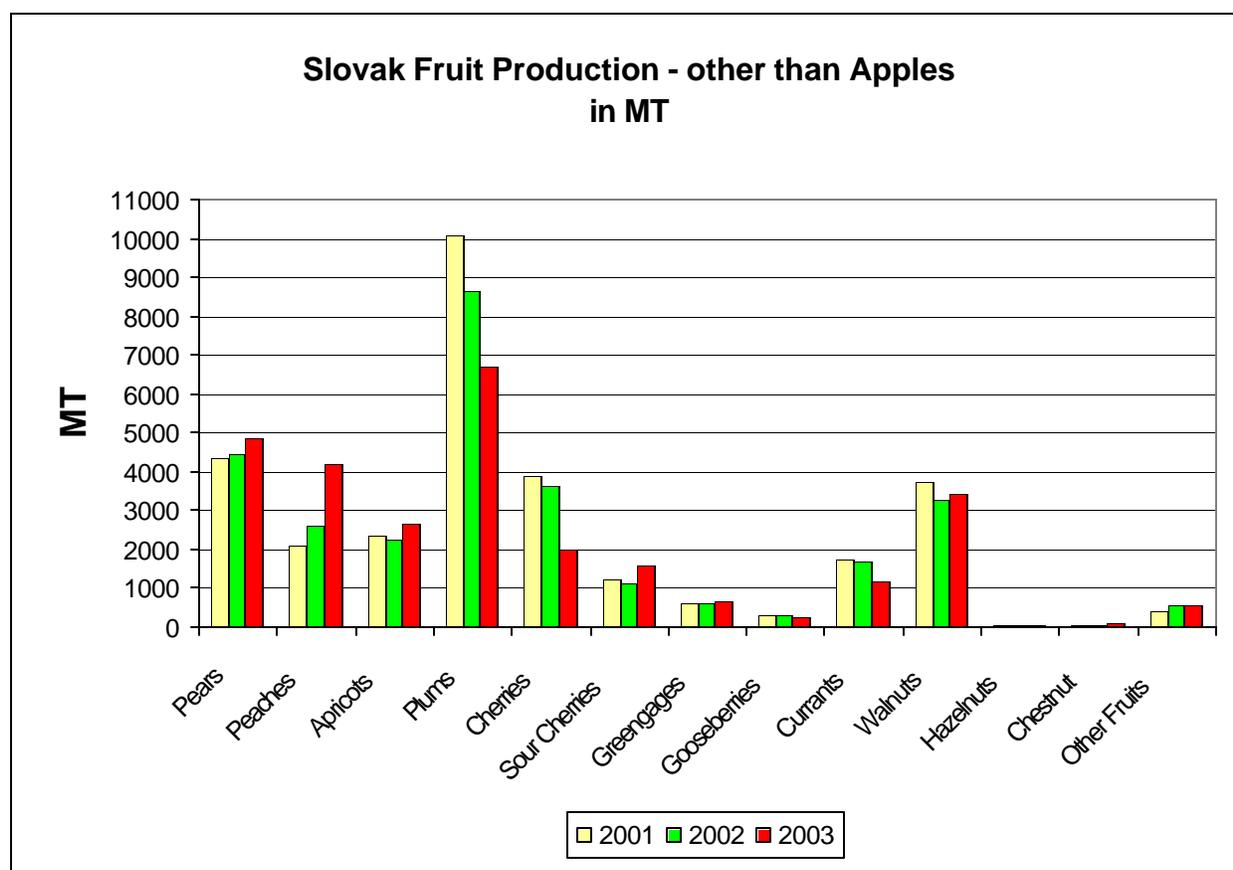


Figure 1: Slovak fruit production other than apples, 2001 to 2003

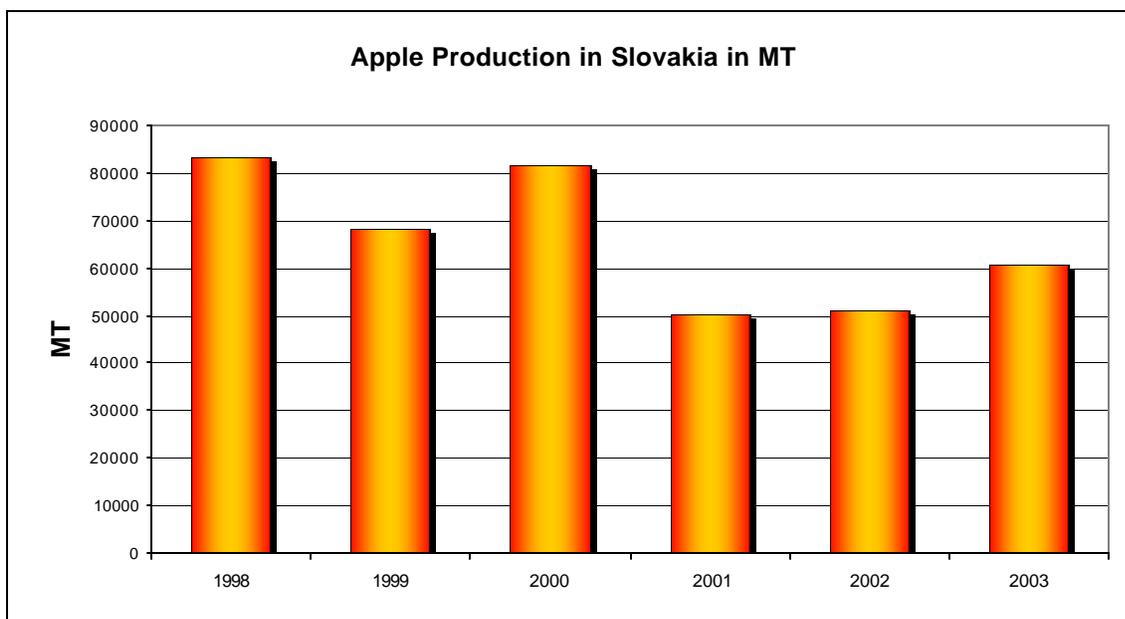


Figure 2: Apple production in Slovakia from 1998 to 2003

Fruit Consumption

The falling trend in consumption of fruit and fruit products also continued in 2002. Consumption of fruit and fruit products decreased by 1.6 kg (-3.1 percent) to 49.7 kg per capita in 2002 compared to 2001. In 2002, Slovaks also consumed less fresh fruit (-0.9 kg or -.2 percent) as well as apples (-0.3 kg or -2.4 percent) than in the previous year (Figure 3). Total domestic consumption declined steadily from 1999 to 2002. It is estimated that domestic consumption will rise again in 2003 by 541 MT or 0.6 percent. Due to an increasing health awareness growing fruit consumption for the next years is expected.

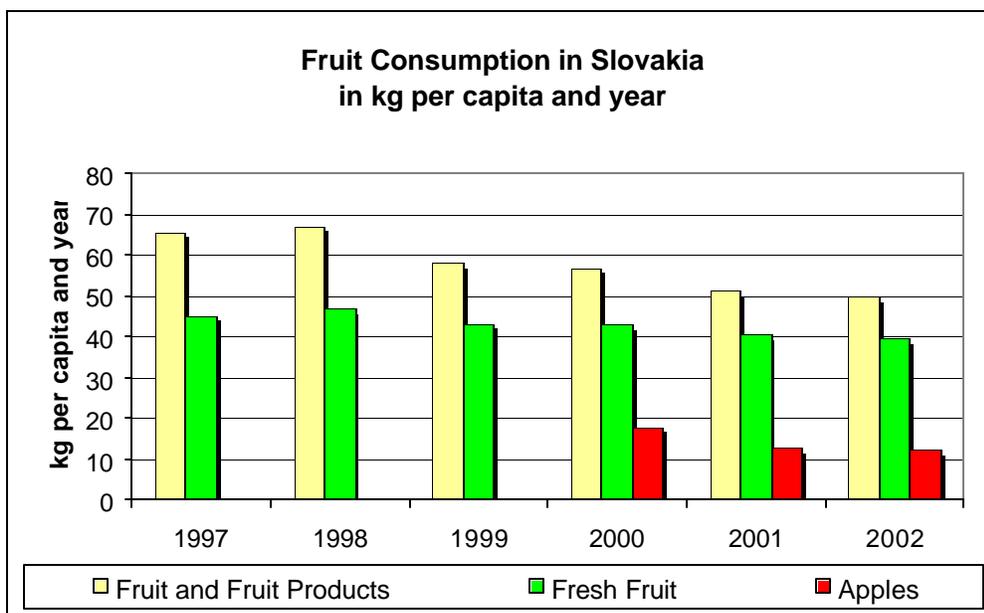


Figure 3: Fruit consumption in Slovakia, 1997 to 2002

Trade and Prices

Slovakia is net importer of fresh fruit and processed fruit. Imports of fresh fruit amounted to 173,070 MT (+ 2.7 percent more than in 2002), whereas exports amounted to 18,065 MT (+ 22.8 percent compared to 2002). The negative trade balance showed a value of thousand SKK -2,827,340 (thousand US\$ 77,165). In 2003, the Slovak Republic imported 36,660 MT (+ 17.6 percent compared to 2002) of processed fruits and exported 12,755 MT (+ 29.8 percent. more than the year before). This means a negative trade balance of SKK -908,588 thousand (US\$ 24,710 thousand). Major import and export markets are the EU 10 and the Czech Republic.

Average producer prices for Apples in 2003 accounted for SKK 1,175 (US\$ 319.7) per MT. This is 0.7 % more than the previous year. In the first half of 2003 apple prices were higher than in 2002, but due to the larger crop, prices dropped in the second half of the year.

PSD Table							
Country	Slovakia						
Commodity	Apples, Fresh						
							(HA)(1000 TREES)(MT)
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official	Estimate	DA Official	Estimate	DA Official	Estimate	[New]
Market Year Begin		07/2002		07/2003		07/2004	MM/YYYY
Area Planted	7000	7000	6500	5900	0	5500	(HA)
Area Harvested	3724	3724	3750	3519	0	3500	(HA)
Bearing Trees	7091	7091	7100	7740	0	7700	(1000 TREES)
Non-Bearing Trees	500	500	500	500	0	500	(1000 TREES)
Total Trees	7591	7591	7600	8240	0	8200	(1000 TREES)
Commercial Production	51172	45672	51500	55185	0	55000	(MT)
Non-Comm. Production	5500	5500	5500	5500	0	5500	(MT)
TOTAL Production	56672	51172	57000	60685	0	60500	(MT)
TOTAL Imports	29992	29992	32000	32967	0	33000	(MT)
TOTAL SUPPLY	86664	81164	89000	93652	0	93500	(MT)
Domestic Fresh Consump	47769	47769	48000	48500	0	48500	(MT)
Exports, Fresh Only	6895	6895	8000	6165	0	8000	(MT)
For Processing	32000	26500	33000	38987	0	37000	(MT)
Withdrawal From Market	0	0	0	0	0	0	(MT)
TOTAL UTILIZATION	86664	81164	89000	93652	0	93500	(MT)

Prices Table			
Country	Slovakia		
Commodity	Apples, Fresh		
Prices in	SKK	per uom	MT
Year	2002	2003	% Change
Jan	11500	12833	12%
Feb	11500	11720	2%
Mar	11300	11440	1%
Apr	11300	11000	-3%
May	10900	12000	10%
Jun			
Jul	11500	11667	1%
Aug	10025	10593	6%
Sep	11883	11170	-6%
Oct	12800	12123	-5%
Nov	12348	11500	-7%
Dec	13354	13250	-1%
Exchange Rate	39.81	Local Currency/US \$	
Date of Quote	12/31/2002	MM/DD/YYYY	

Average exchange rate in 2003:
US\$ 1 = SKK 36.77